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DOCUMENT-IDENTIFIER: US 5640577 A

TITLE: Data processing system with automated at least partial forms completion

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Brief Summary Text - BSTX (12):

The data processing system stores at least one previously entered form for use by the operator terminal. Also included is a **forms manager** and coordinator which is responsive to at least a first one of the data processing function selectors and to at least one datum displayed in a data field at a predetermined data terminal screen coordinate position, for retrieving a predetermined form and displaying the form on the data terminal screen of the operator terminal.

Brief Summary Text - BSTX (14):

In the preferred embodiment, the intelligent resource server includes the number of previously completed forms. At least one of the forms includes a number of uncompleted fields. Further, the **forms manager** and coordinator is responsive to a first selected data processing function selector and to at least one datum displayed in at least one data field at a predetermined coordinate position on the operator terminal, for retrieving a predetermined form, for inserting at least one datum previously displayed on the operator terminal display screen into an uncompleted field in the form, and for saving the at least partially completed form.

Detailed Description Text - DETX (5):

According to the preferred embodiment of the present invention, the intelligent resource server includes a **forms manager**/coordinator 24 which in the preferred embodiment, incorporates at least a text editor 26 for generating and storing a number of blank forms 28.

Detailed Description Text - DETX (9):

Prior to utilizing the data processing system with automated forms generation according to the present invention, the system administrator/manager utilizes the editor function 26 of the **forms manager**/coordinator 24 to generate and store one or more blank forms, illustrated by forms box 28. Such an editor includes any conventional text or graphics editor which allows the user to generate text or graphics to be displayed on an operator terminal screen. The

present invention contemplates that forms may include display screens with incomplete or missing information, mere textual information such as forms or procedures outlines or manuals, or combinations of both.

Detailed Description Text - DETX (17):

Subsequently, the steps indicated in lines 5, 6 and 7 of Table I illustrate how the forms manager retrieves from the specified operator terminal memory location, the data contained in that memory location, and displays the data on the screen at the data terminal screen coordinate positions indicated by the row (R) and column (C) designations. Thus, in effect, the user definable function selector command sequence "fills in" the previously blank form. Subsequently, another Smart Button.TM. which has been previously defined to save the form is depressed or selected, thus saving the now partially or fully completed form to disk or memory, as shown at 64.

Detailed Description Text - DETX (22):

As shown in FIG. 4A, a second application program displays a second computer session 110a on the data terminal screen wherein a second group of information such as, for example, Visa Card account number, transaction history, etc., is displayed as shown at 118a and 118b, and subsequently transferred to the form as shown at location 120. It should be noted that in the display of the second computer session 110a, the applications program which controls the display of information has displayed the customer's I.D. and account number at a different location on the operator's data terminal screen than in the previous computer session display 110, FIG. 3A. In addition, date or other information may have been added or even omitted. Thus, an operator need not concern himself or herself with finding information on the screen but rather, access to a particular applications program utilizing a user definable function selector such as a Smart Button.TM. which has been programmed to automatically retrieve the appropriate information from the predefined location on the data terminal screen, will cause the forms manager to fill in that information on the preselected form.

Claims Text - CLTX (1):

1. A data processing system including a dynamic forms manager and coordinator, comprising:

Claims Text - CLTX (6):

said resource server also including a dynamic forms manager and coordinator, responsive to at least a selected first one of said programmable data processing function selectors, for dynamically retrieving at least a first datum contained in at least one data field displayed on said data terminal display screen at a predetermined data terminal screen coordinate position indicated by said selected first one of said programmable data processing function selectors, and for retrieving at least a second datum displayed on said data terminal display screen at a pre-determined data terminal screen coordinate position, said forms manager and coordinator for dynamically inserting said at least first and second retrieved datum into at least a selected first and second of said uncompleted fields of said at least one form

indicated by said selected first one of said programmable data processing function selectors, for at least partially completing said at least one form;
and

Claims Text - CLTX (7):

said **forms manager** and coordinator responsive to a selected second one of said programmable data processing function selectors of said at least one operator terminal, for storing said at least partially completed form in said resource server for subsequent access by any one of said plurality of operator terminals.

Claims Text - CLTX (8):

2. A data processing system including a database and data structure independent **forms manager** and coordinator, said data processing system comprising:

Claims Text - CLTX (11):

said data processing system further including a **forms manager** and coordinator, responsive to at least a first one of said plurality of programmable data processing function selectors, for at least retrieving at least a first datum displayed on said data terminal display screen at a predetermined data terminal screen coordinate position and obtained from said at least a first data source, said **forms manager** and coordinator for retrieving at least a second datum displayed on said data terminal display screen at a pre-determined data terminal screen coordinate position and obtained from said second data source, and for inserting said retrieved datum into at least one of said uncompleted fields of said at least one form to be completed and which is indicated by said selected first one of said plurality of programmable data processing function selectors, for at least partially completing said at least one retrieved form.

Claims Text - CLTX (15):

6. The system of claim 5 wherein said **forms manager** and coordinator is responsive to said selection of one of said data processing function selectors, for selecting at least one form from among said plurality of forms into which said retrieved data is to be inserted.

Claims Text - CLTX (17):

wherein said **forms manager** and coordinator retrieves data from at least one predetermined memory location associated with said predetermined data terminal screen coordinate position.

Claims Text - CLTX (18):

8. The system of claim 7 wherein said **forms manager** and coordinator stores said at least partially completed form to said memory of said at least one operator terminal.

Claims Text - CLTX (19):

9. The system of claim 2 wherein said forms manager and coordinator stores said at least partially completed form to a disk drive coupled to said data processing system.

Claims Text - CLTX (20):

10. The system of claim 2 wherein said forms manager and coordinator is responsive a selected one of said data processing function selectors, for printing said at least partially completed form on a printer coupled to said data processing system.

Claims Text - CLTX (29):

17. The data processing system of claim 2, wherein said forms manager and coordinator is responsive to a selected second one of said data processing function selectors of said at least one operator terminal, for storing said at least partially completed form in said data processing system.